



# Estate Accounting



Calgary - September 29, 2015 | Edmonton - October 1, 2015

**Discover** important concepts of estate accounting, including a discussion of formal and informal accounting, review, and passing of accounts.

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Legal Education  
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## LOCATIONS & DATES

### CALGARY

Sept. 29, 2015

Glenmore Inn  
2720 Glenmore Trail SE

### EDMONTON

Oct. 1, 2015

Sutton Place Hotel  
10235 101 Street NW

9:00 AM - 4:30 PM

### WHO SHOULD ATTEND

This program is appropriate for practitioners during their first 5 years of practice. It will assist junior lawyers seeking a practical foundation or more experienced lawyers wanting to revisit the fundamentals or develop an interest in the wills & estates practice area.

### CHAIR

**Shelly Chamaschuk**

Reynolds Mirth Richards & Farmer LLP  
Edmonton, Alberta

### FACULTY

**Malkit Atwal**

Field LLP  
Edmonton, Alberta

**Ted Crane**

D'Arcy and Deacon LLP  
Calgary, Alberta

**Wanda Fawcett**

Bishop & McKenzie LLP  
Edmonton, Alberta

**Benjamin Kormos**

Walsh LLP  
Calgary, Alberta



**This course will  
be available as a  
seminar on demand**

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# Estate Accounting

LEARNING LEVEL | FUNDAMENTAL

## Duties to Account | Wanda Fawcett

Determine what duty to account means, where it comes from, and when it is necessary. Understand statutory and common law duties. Review the process for obtaining clearance certificates and court discharges.

## Acceptable Accounting | Malkit Atwal

Learn key elements of estate accounting, including the type of accounting required, the timelines, and the parties involved. Acquire practical tips on how to prepare a proper set of accounts, and discuss the similarities and differences between an executor's duty to account and an attorney's duty to account under a power of attorney.

## Court Process and Procedure | Benjamin Kormos

Understand the estate litigation mechanisms available through the Surrogate Court to pass or require an accounting (either under a power of attorney or on behalf of a personal representative, the beneficiaries, or other interested parties in an estate).

## Issues Before the Courts | Ted Crane

Review situations where Court approval is required and where it would be wise to obtain advice and direction. Learn about the types of cases that often proceed to litigation for court determination of various accounting issues.

Explore estate accounting litigation with reference to recent court decisions on issues, such as:

- Personal representatives' duties,
- Mismanagement,
- Compensation, and
- Legal fees.





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## ONLINE REGISTRATION

**Immediately reserve your spot in this program. Register online!**

- 1 Visit **LESA.org**
- 2 Enter the seminar code **31963** into the “**Search our catalogue**” field.
- 3 Add to your cart, complete your purchase, and mark your calendar!

## MORE REGISTRATION OPTIONS

**MAIL:** 2610, 10104 - 103 Avenue,  
Edmonton, Alberta T5J 0H8

**EMAIL:** [lesa@lesa.org](mailto:lesa@lesa.org)

**PHONE:** 780.420.1987

**TOLL FREE IN AB:** 1.800.282.3900

**FAX:** 780.425.0885

- CALGARY** September 29, 2015
- EDMONTON** October 1, 2015
- EARLY BIRD:** On or before August 25, 2015 \$355 + GST (Lunch is included.)
- REGULAR:** \$395 + GST (Lunch is included.)
- I am unable to attend this seminar, but please email me when the seminar on demand (materials and video recordings) is available.

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( Please make cheques payable to the Legal Education Society of Alberta )

**CANCELLATIONS:** Registration fees, less a \$50.00 administration fee, will be refunded for cancellations received in writing at least 3 full business days prior to the seminar. Refunds cannot be given after that date; however, seminar materials, if any, will be forwarded. Registrant substitution is permitted at all times.

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